

Integrating Upstream Patient Education Materials

A checklist for health center administration staff for integrating patient education materials into workflows.

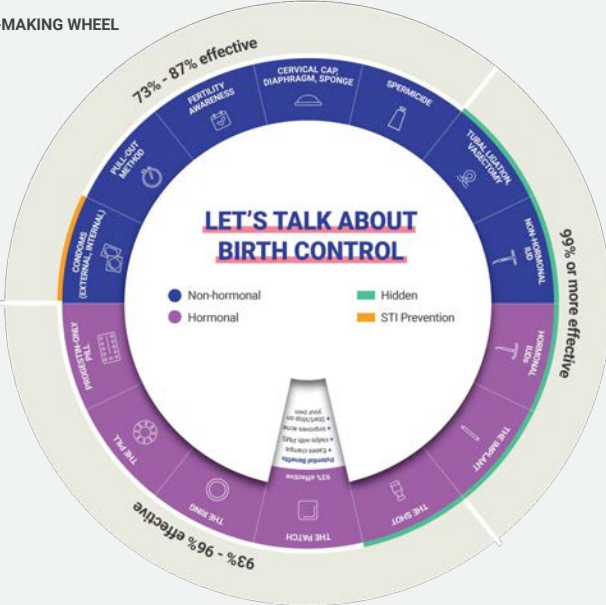
Patient education materials (P.E.M.) work best when they are integrated into the health center in a purposeful way. Our materials are designed to be flexible and can be used in more than one setting and application. Use this guide for recommendations on how to integrate Upstream's P.E.M. into your health center to support patient counseling and education.



Healthcare team role

Ex: Health Service Administrator, Administrative Assistants, Front-desk staff, Phone staff

DECISION-MAKING WHEEL



WELCOME BOOKLET

HOW DO I CHOOSE THE RIGHT BIRTH CONTROL FOR ME?

ALL QUESTIONS ARE GOOD QUESTIONS

DEAR BIRTH CONTROL...

WHAT ARE MY BIRTH CONTROL OPTIONS?

POSTCARDS

CONDOMS

HORMONAL IUDs

THE IMPLANT

NON-HORMONAL IUD

THE PATCH

THE PILL

THE RING

THE SHOT

Materials for every step of the in-health center journey

WAITING ROOM

Set tone for experience



Welcome Booklet
Posters
Swag

CONSULTATION

Enable self-guided learning



Postcards

CONSULTATION

Facilitate conversations



Decision-Making wheel
Postcards

BEYOND CLINIC

Encourage ongoing learning



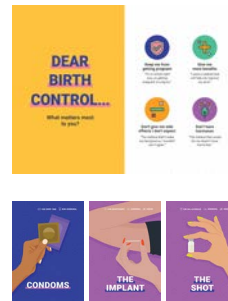
Printer-friendly one-pagers
Upstream.org/birthcontrol
Swag

01

Accessing and ordering P.E.M.

After your training with Upstream, your health center will receive an initial stock of Upstream's patient education materials provided by Upstream.

Replenish your inventory and add new materials to your practice in the following ways:



Ordering print copies

Order printed materials from our online marketplace at:

marketplace.mimeo.com/Upstream

Items can be shipped anywhere in the continental U.S.



Free digital download

Free, downloadable PDF versions of the materials are available on our [partner resources portal](https://portal.upstream.org/partner-resources-portal) for use in telehealth settings.

Printer-friendly one-pagers are also available for in-office printing.

portal.upstream.org/patient-education

02

Stocking your practice

In order for P.E.M. to be used effectively, it must be easy-to-access by staff for both in-person and telehealth settings.



Order print materials

We suggest that every exam room has one copy of the following:

- Decision-Making Wheel
- Set of birth control method postcards

We recommend copies of the Welcome Booklet for the Lobby/waiting area. Consider stocking the Front Desk with copies to hand out to patients when they check-in.



Download digital versions

Go to the Upstream Partner Resources portal to download digital versions of the welcome booklet, birth control method postcards, and an adapted version of the decision-making wheel.

portal.upstream.org/patient-education/

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Preparing digital systems

Make sure that your team can access printer-friendly versions of the materials to offer as takeaway material for patients presenting in-person and that staff can access digital copies of the material to use during telehealth appointments.



Upload materials to patient portal and/or EHR

Upload the telehealth- and printer-friendly versions of our materials to your center's patient portal and/or EHR for communicating with patients and for ease of use by staff.



Save materials locally to clinic computers

Download and save the telehealth- and printer-friendly versions of the materials to clinic computers, if part of your center's operating procedures.



Customize EHR and patient portal alerts

Consider adding a link to Upstream's birth control choices [page](#).

Sample Patient Portal/Text Alert:
"Reminder of your appointment tomorrow! Take a look at upstream.org/birthcontrol to learn about your birth control options before talking to your provider."



Upstream partner portal and website unblocked

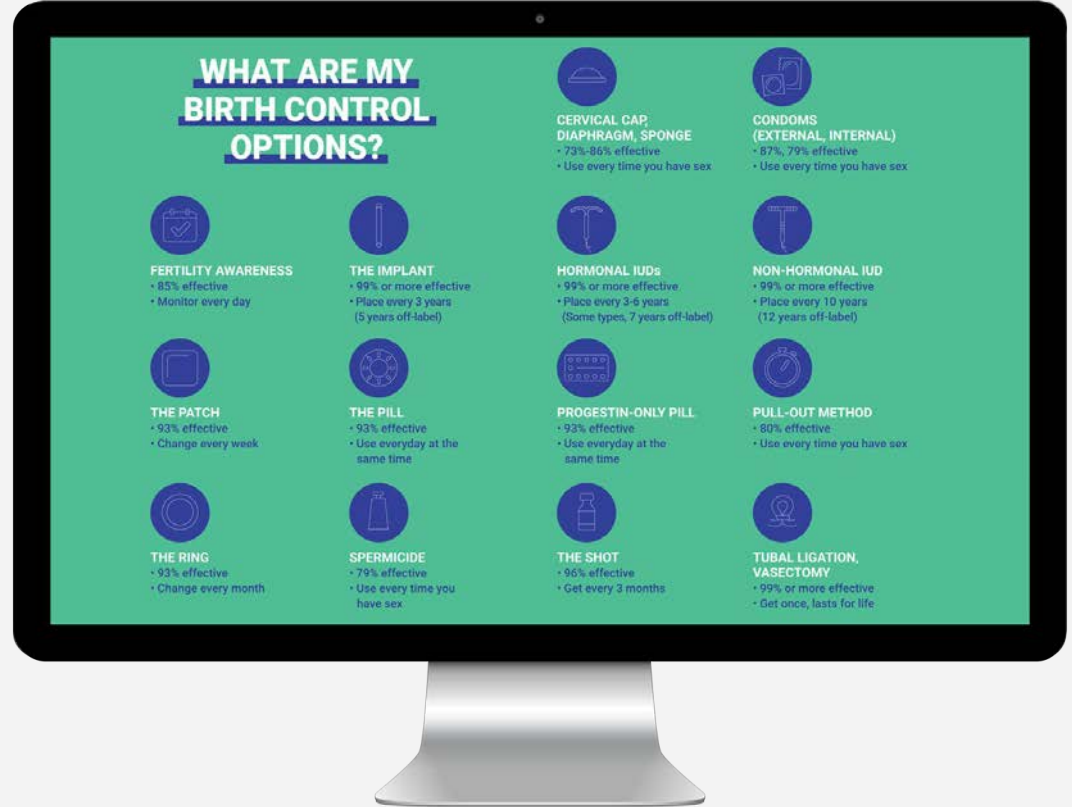
Make sure that staff can access portal.upstream.org and upstream.org over health center internet and that the sites are not blocked by internal firewalls.

Bonus tip!

Desktop backgrounds

Set the “What are my birth control options?” chart as the background or screensaver on clinic computers as a quick reference and reminder about the full range of contraceptive methods.

Consider adding it to front desk/phone staff computers, which could aid in scheduling telehealth appointments.



Bonus tip!

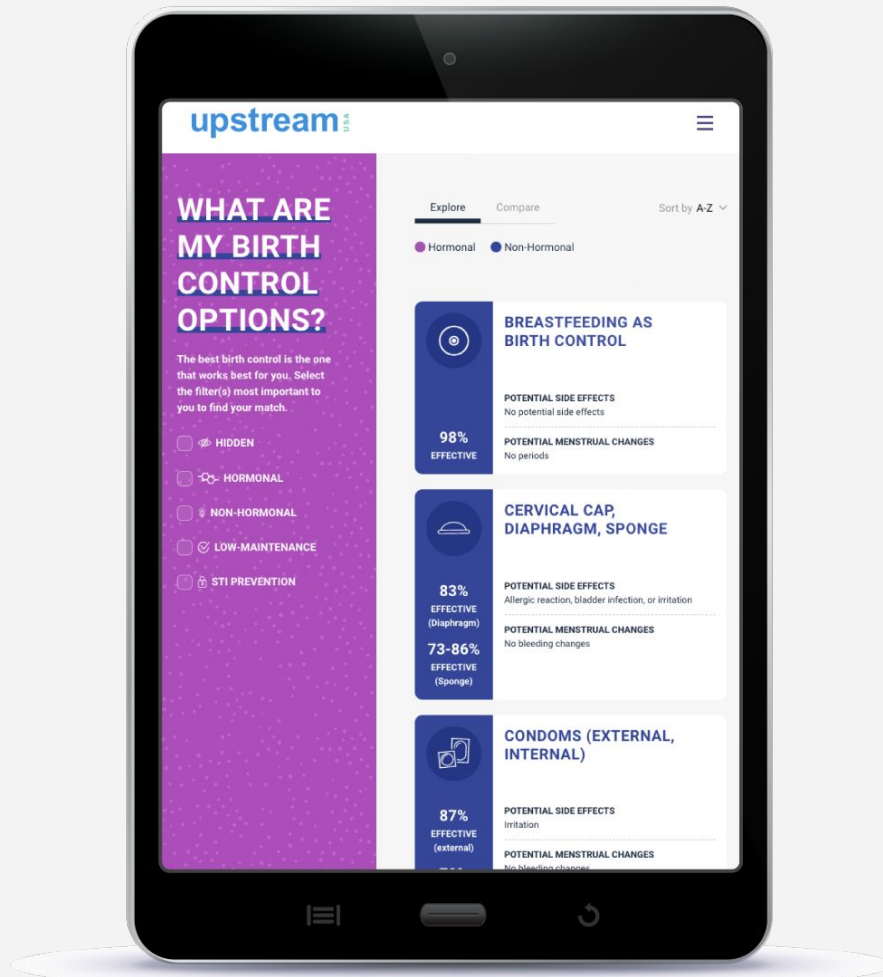
Bookmark

upstream.org/birthcontrol

Make our digital birth control tool quickly accessible to patients and their healthcare teams by bookmarking the page on clinic computers and tablets.

For tablet use, consider adding a website icon to the home screen for even quicker access.

[Instructions for iPad](#)



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Caring for materials

We recommend that professionally printed patient materials remain in the health center to promote cost-effectiveness. (Print-friendly versions are available for patient takeaways.) You can take additional steps to maximize the longevity of the materials.



Store materials in assigned areas when not in use

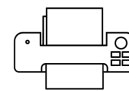
Decision-wheel and postcards can be stored in exam room cabinet.

Booklet copies can be stored at the front-desk.



Anchor Decision-Making Wheel so it is not misplaced

Anchor the decision-making wheel to carts or tables using sturdy string or ball-and-bead chains to ensure it is not moved from desired location.



Laminate materials to preserve lifespan

Download and save the telehealth- and printer-friendly versions of the materials to all clinic computers, if part of your center's operating procedures.



Attach Birth Control Postcards to a key ring

Postcards can be laminated and hole-punched so they fit on a key ring. This is easy to transport from room-to-room and travels easily with the support staff or provider.

Bonus tip!

Sanitize your materials

Sanitize laminated materials after use.

Use non-laminated versions for patient takeaways or single-use.

